



# Gateway documents module

User guide

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## Documents

### Purpose

- The documents section allows you to access:
  - ESF documents
  - School documents

### Managed by

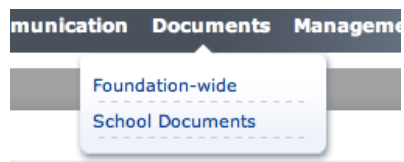
- Document manager.

### Access by

- All users

### Access to module

- This module is available to all schools by default.
- From the **Gateway** menu choose **documents**.

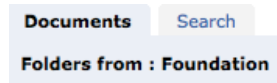


## Foundation wide

- In this section you can find documents issued by ESF including:
  - Useful forms
  - Minutes of meetings
  - Etc.

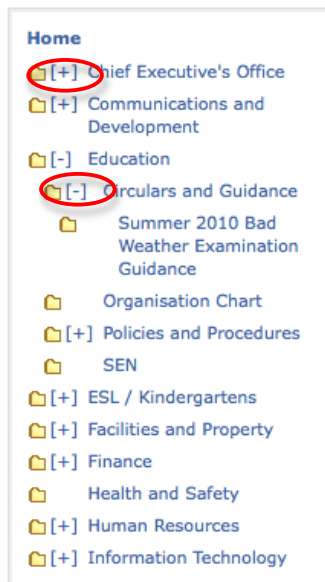
## Documents

- The first tab is documents.

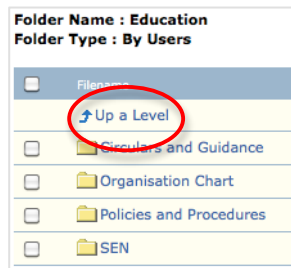


## Folders

- You will see a list of folders



- Use the + and – icons to expand and collapse the folder structure.
- Use this section to look at the folder structure quickly.
- On the right hand side click on a folder to open it.
- Click on **up a level** to return to where you were.

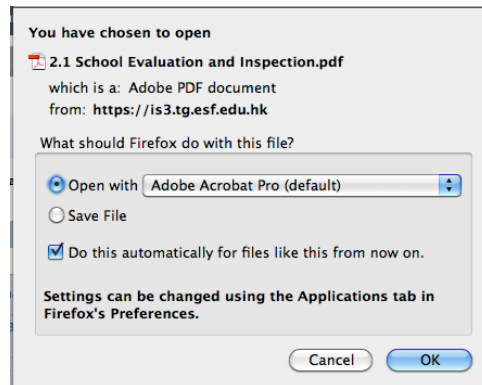


## Download files

- If you drill down far enough you will eventually find files.

Filename	FileSize	Last Update	
Up a Level			
2.1 School Evaluation and Inspection	68.97 KB	26/04/2010 00:37	[ Copy Link ]
2.2 Supporting Brief for Reviews of Schools and Colleges	176.08 KB	26/04/2010 00:37	[ Copy Link ]
Microsoft Word - measuring progress and adding values	88.71 KB	28/06/2010 10:02	[ Copy Link ]

- Click on a file name to download it. You can choose to open or save the file.



## Copy link

- Instead of opening it you may wish to show users where to find the document. To the right of the file name click on **copy link**.

<input checked="" type="checkbox"/>	2.1 School Evaluation and Inspection	68.97 KB	26/04/2010 00:37	[ Copy Link ]
<input checked="" type="checkbox"/>	2.2 Supporting Brief for Reviews of Schools and Colleges	176.08 KB	26/04/2010 00:37	[ Copy Link ]
<input type="checkbox"/>	Microsoft Word - measuring progress and adding values	88.71 KB	28/06/2010 10:02	[ Copy Link ]

- You can then paste the link into a document or email using your usual method to paste text.

## Search

- Choose the search tab.
- Enter details of the document you wish to find then click on **search**.

Documents **Search**

Find Document

Keyword(s)

Site  Foundation-wide  Island School

Searched Result (4)

File Name	Size (MB)	Last Update	Type	Site
2.1.1.iv Risk Assessment Form	0.05	16/09/2010	By Users	Foundation
2.1.1.v Risk Assessment Form Sample Completed	0.08	16/09/2010	By Users	Foundation
3.1(i) Appendix J Risk				

- The results of the search will be shown below.

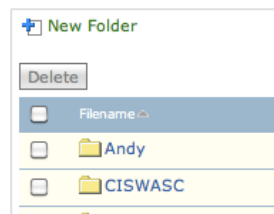
## School documents

- The school may upload their own files into this area although only the document manager can do this.
- The left hand side works the same way as it does for the foundation wide section.



## Add folder

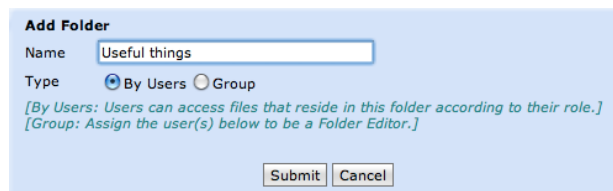
- The right hand side has an extra icon that allows you to create folders.



- Click on **new folder**.

## By user

- The default option when creating a new folder is to create it *by users*.

A screenshot of an 'Add Folder' form. It has a 'Name' field with the text 'Useful things'. Below that is a 'Type' section with two radio buttons: 'By Users' (which is selected) and 'Group'. There are two lines of small text below the radio buttons: '[By Users: Users can access files that reside in this folder according to their role.]' and '[Group: Assign the user(s) below to be a Folder Editor.]'. At the bottom of the form are 'Submit' and 'Cancel' buttons.

- A folder created in this way will be accessible to everyone.

## Group

- Only people included in the group will be able to access the folder.
- Click on the **group** button.

- Select users from the lists on the right using **add** or **add all**.
- Remove users from the group in the same way.
- When complete click on **submit**.

## Edit

- When you have created a folder you can click on edit to make changes to it.

<input type="checkbox"/>	Departments	By Users	[ Edit ]
<input type="checkbox"/>	Development Plan	By Users	[ Edit ]
<input type="checkbox"/>	Emergency Procedures	By Users	[ Edit ]
<input type="checkbox"/>	Examinations	By Users	[ Edit ]
<input type="checkbox"/>	Guidance and Achievement	By Users	[ Edit ]

## Upload

- When you open a folder you can upload files.

**Folder Name : Guidance and Achievement**  
**Folder Type : By Users**

[+ New Folder](#)

- Click on **upload**.

**Upload File**

Tags:   
(Maximum 10 words only, separate by a space)

File:

File:

[+ New File](#)

Rights

Teaching Staff

Non-Teaching Staff

Parent

Student

Others

- If you wish enter some tags separated by commas to aid searching.
- Choose the file, or files, you wish to upload.
- Specify which users may access the file.
- When ready, click on the **upload** button.

## Manage

- You can see which users have access to the file by the ticks shown alongside.

Filename	FileSize	Last Update	T	N	P	S	O
<a href="#">Up a Level</a>							
<input checked="" type="checkbox"/> Child Protection Procedures	18.44 KB	20/04/2010 21:59	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/> Child Protection Statement	37.97 KB	20/04/2010 21:59	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Exclusion Policy	18.67 KB	20/04/2010 21:59	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

- If you wish to change the settings for files you have uploaded click on manage on the right hand side.

**Viewing Rights**

Tags:   
(Maximum 10 words only, separate by a space)

Teaching Staff

Non-Teaching Staff

Parent

Student

Others

- Make the changes then click on **submit**.

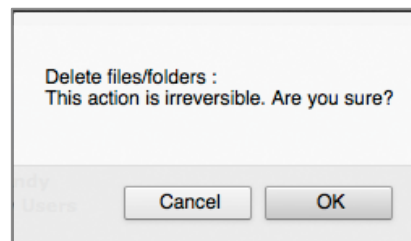


## Delete

- If you wish to delete one or more files check the check boxes alongside the file names.



- Click on **delete**.
- You will be asked to confirm that this is what you want to do.



- Click on ok to remove the file.